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World Production and Trade

United States
Department of
Agriculture

Foreign
Agricultural
Service

Washington, D.C. 20250

Weekly
Roundup

WR 48-86

Dec. 4, 1986

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

GRAIN AND FEED

SOUTH AFRICA Sells Corn to SOUTH KOREA. South Korea purchased 40,000 metric tons of South African corn for January delivery at \$89.94 per ton, cost and freight (C&F). This is the largest South African sale to Korea in five years and almost double the amount sold in all of 1985/86 (Oct/Sept). This sale could signal South Africa's intention to become a more important supplier to Korea which would intensify competition with the United States, Thailand, China and Argentina. U.S. corn exports to South Korea have declined steadily from 3.9 million tons in 1982/83 to 1.3 million tons in 1985/86; the U.S. share of the Korean corn market dropped from 99 percent to 38 percent during the same period.

ARGENTINA Faces Durum Wheat Shortage. Argentina's durum wheat production has declined substantially in recent years, totaling only about 30-40,000 tons in 1985/86, according to the U.S. agricultural counselor in Buenos Aires. This represents the smallest crop since the record 1969/70 harvest of 760,000 tons. The sharp decline in the 1985/86 harvest was partially due to heavy rains and flooding during the growing season. Over the longer term, however, higher-yielding bread wheat varieties continue to displace the more traditional durum varieties. As a result, farmers have found the bread quality wheats more profitable despite a 25-percent higher durum support price. It is probable that the government will take future actions to induce farmers to plant more durum. Argentina recently purchased 12,500 tons of durum from the United States.

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COTTON AND FIBERS

U.S. Cotton Exports Strong. U.S. cotton exports continued strong during October, totaling 342,000 bales, the largest October level since 1979. Major markets this season are Japan, South Korea, the European Community, Taiwan and Indonesia. Cumulative first quarter exports now total 1 million bales, 60 percent above the same period of 1985/86 and 1 percent above the five-year 1980/81-1984/85 average. Total 1986/87 season exports are forecast at 6.75 million bales, compared to only 2 million bales last season.

TOBACCO

The world production estimate for tobacco will appear in the December 10 Weekly Roundup.

FRUITS AND VEGETABLES

SPANISH Horticultural Areas Sustain Crop Damage. Horticultural production areas in Valencia and Murcia sustained extensive damage from hail and rain storms during early October. However, citrus fruits not damaged by the storms are expected to have benefited from the additional moisture. The autonomous governments in these provinces recently released the first assessments of crop damage, according to the U.S. agricultural counselor in Madrid. Losses are estimated as follows:

Valencia	Metric Tons	Losses (U.S. Dollars)
Citrus		
(Mainly Tangerines)	78,000	24 million
Wine & Table Grapes	21,900	3 million
Vegetables	3,300	1 million
Other Crops		
(Almonds, Olives, Etc.)	N/A	1 million
Total		29 million
Murcia		
Citrus, Peaches, Wine Grapes and Peppers		13 million

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Estimates of FRANCE'S Dried Prune Production Revised Upward. Dried prune production in France during the past two seasons is believed to be larger than the original forecast, according to the U.S. agricultural counselor in Paris. The 1985/86 pack is now estimated at 25,742 tons, 1 percent greater than the previous forecast of 25,500 tons. The 1986/87 pack has been revised to 34,500 tons, 500 tons more than the preliminary forecast. Both packs have yielded "large" to "exceptionally large" fruits of good quality and high sugar content.

Larger NORTHERN HEMISPHERE Citrus Crop Expected. Citrus production in selected countries of the Northern Hemisphere for the 1986/87 season is forecast at 30.9 million tons, up 6 percent from last season's 29.1-million-ton harvest. Larger harvests are expected in the United States, Mexico, Cuba, Spain, Greece, Italy, Cyprus, Turkey, Egypt and Israel, with smaller crops expected in Japan and Morocco. Citrus production by fruit type, with 1985/86 estimates in parentheses, are as follows (in million tons): sweet oranges 18.35 (16.99), tangerines 5.43 (5.67), lemons 2.78 (2.41), grapefruit 3.12 (2.89), and other citrus--including sour oranges and limes--1.18 (1.11).

In the United States, 1986/87 citrus production is forecast to be up 14 percent from last season and the largest crop since 1982/83. Orange production (including temples) is forecast at 7.87 million tons, up 14 percent. The Florida orange crop is forecast at 5.41 million tons, up 9 percent, while the California orange harvest is expected to total 2.35 million tons, up 26 percent. The U.S. grapefruit crop is projected at 2.33 million tons, up 9 percent from last season, and the lemon crop at 852,000 tons, up 35 percent. A 321,000-ton tangerine crop (including tangelos) is forecast for 1986/87, up 25 percent from 1985/86. The Texas citrus crop is expected to total 109,000 tons, six times larger than last year. Due to a severe freeze in December 1983, no commercial citrus supplies were harvested in Texas during the 1984/85 season.

In Mexico, 1986/87 citrus production is expected to be 4 percent higher than last season. Orange production is forecast at 1.43 million tons, slightly above last year. Orange production continues to recover from the freeze damage incurred during December 1983. However, a drought during the flowering stage in the states of San Luis Potosi and Veracruz has lowered expected fruit quality and prevented a larger increase in this year's crop. Orange production in the state of Nuevo Leon is beginning to recover from the 1983 freeze, although this year's crop is expected to be only about one-quarter of the pre-freeze level. Producers in Nuevo Leon have salvaged about 7,000 hectares of orange groves and have also replanted 3,000-5,000 hectares following the 1983 freeze. Production of other citrus, mostly limes, is forecast at 600,000 tons, 20 percent higher than 1985/86. Mexican Key lime production is expected to be up sharply, while Persian lime production is expected to be lower.

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In Cuba, 1986/87 citrus production is forecast up 5 percent from last year. Several years of drier than normal weather combined with relatively few new citrus plantings have substantially slowed production growth rates following the rapid expansion of the late 1970's and early 1980's.

In Japan, 1986/87 citrus production is expected to fall 12 percent from last season. Tangerine production is forecast at 2.53 million tons, 12 percent below last year. The anticipated drop is due to an unusually severe winter and a continuing area reduction under the government's on-going production adjustment program. In addition, this year is an off-year for the alternate bearing Satsuma crop, which accounts for 85 percent of the total tangerine harvest. Orange production is projected at a record 65,000 tons, 3 percent higher than last season. Orange production continues to grow gradually as land is diverted from Satsuma production to oranges, principally navels.

Spain's 1986/87 citrus crop is expected to be 8 percent higher than last season and the largest crop since the record 1983/84 harvest. Orange production is forecast at a record 2.1 million tons, up 8 percent, and tangerine production at 1.06 million tons, up 1 percent. Earlier-season optimism concerning tangerine production was dimmed somewhat due to heavy storms in early October. Lemon production is forecast at a record 0.59 million tons, 23 percent above last year and 82 percent above the freeze-reduced 1984/85 harvest. The larger 1986/87 citrus crop is generally attributed to abundant irrigation water supplies which helped compensate for a dry, hot spring and summer.

In Italy, 1986/87 total citrus production is expected to be at a near-record level, 3 percent above last season. Orange production is projected at 2.26 million tons, little changed from last season. Tangerine production is forecast up 16 percent; mandarin production is expected to be virtually unchanged this season, while clementine production is forecast up sharply. Lemon production is forecast at 830,000 tons, up 4 percent from last year. In Greece, production is expected to be at a record level, up 30 percent from last year. Weather conditions have been favorable for citrus, with the exception of lemons which were hit by heavy rains during the blossoming period. Orange production is projected at a record 800,000 tons, 44 percent higher than last year. Lemon production is expected to total 170,000 tons, down 9 percent.

In Cyprus, 1986/87 citrus production is forecast 3 percent higher than a year earlier. Larger orange, lemon and grapefruit crops are expected this season. In Turkey, the 1986/87 citrus harvest is forecast to be 9 percent higher than last year's harvest which was hurt by freezing weather and was the smallest since 1978/79. This year's orange harvest is forecast at 600,000 tons, up 9 percent, and tangerine production at 260,000 tons, up 8 percent. Lemon production is projected at 200,000 tons, up 11 percent. Israel's 1986/87 citrus production is expected to rise 14 percent from last year's drought-reduced level. Orange production is forecast at 840,000 tons, up 19 percent, and grapefruit production at 400,000 tons, up 8 percent.

Egypt's 1986/87 citrus crop is forecast slightly higher than last season. Orange production is forecast at 1.17 million tons, up marginally. In Morocco, the 1986/87 citrus crop is expected to be 22 percent below last year and the smallest crop since 1978/79. The decline is attributed to hot winds in April and May when trees were flowering. However, with a smaller number of fruit per tree, size is expected to be up and quality improved. Last year production was at a record level, but quality was below average.

Total citrus production in selected countries of the Northern Hemisphere is estimated as follows, in thousand metric tons.

Country	1984/85	Revised 1985/86	Forecast 1986/87
United States	9,522	10,019	11,442
Mexico	1,723	2,118	2,200
Cuba	640	650	680
Japan	2,673	3,222	2,844
Spain	2,659	3,510	3,787
Greece	990	803	1,042
Italy	3,103	3,562	3,671
Cyprus	301	308	317
Turkey	1,255	1,002	1,095
Israel	1,483	1,256	1,430
Egypt	1,406	1,397	1,403
Morocco	960	1,218	953
Total	26,715	29,065	30,864

SUGAR

SOVIET Sugar Production Higher Than Expected. Raw sugar production in the Soviet Union for the 1986/87 crop year (Sept/Aug) is now forecast at 8.3 million tons, 8 percent more than previously expected and 1 percent more than last year. The forecast was increased following reports appearing in Soviet publications describing lower post-harvest losses and higher-than-average extraction rates. The drought conditions, which affected most of the beet crop, are judged to have produced smaller beets but also have substantially increased the sugar content. Harvesting was completed earlier than normal, but the total tonnage of raw material has not yet been published. There are indications that tonnage of sugar beets for 1986/87 could be almost 10 million tons less than last year's 82.1 million ton crop. Sugar beet losses in 1985/86 are estimated to be in excess of 9.0 million tons, while in 1986/87 losses are not expected to exceed 7.0 million tons.

WOOD AND WOOD PRODUCTS

JAPAN Moves to Relax Restrictions on Wood Construction. The Japanese government will seek a legislative change in building codes to ease restrictions on the construction of three-story wood buildings in urban areas. This move could have a major positive impact on U.S. wood product exports to Japan. The government will submit the bill to the Diet at its next regular session. The revision is in response to pressure from domestic lumber interests as well as from lumber exporting countries. U.S. wood product exports to Japan, which were over \$1 billion in 1985, will reach an estimated \$1.2 billion in 1986.

WORLD FOOD PRICES

Food Prices Steady or Higher in Most WORLD Capitals Surveyed Recently. The general level of food prices remained steady or rose in most of the 15 world capitals reported on recently by U.S. agricultural attaches or counselors. The exceptions were Mexico City, London, Buenos Aires and Tokyo where the general food price level declined. The downturn in prices in these countries was largely due to lower prices for coffee in Mexico City, sirloin steak and pork in London, oranges in Tokyo, and a widespread decline in 10 of the 15 items surveyed in Buenos Aires.

It is important to keep in mind when attempting to make comparisons of these prices that they reflect purchases more typical of U.S. consumers than those of other capitals. Fluctuations in the local currency/dollar exchange rate also account for much of the variation in the surveyed prices. Differences in quality, packing and seasonal variation in supply also will affect any strict comparison between prices.

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World Food Price Comparison Table

FAS Survey of Average Retail Food Prices in Selected World
Capitals, November, 1986

(in U.S. dollars per kg or units as indicated
converted at current exchange rates)

Item	Bern	Bonn	Bras- ilia	Buenos Aires	Can- berra	London	Madrid	Mexico City
Steak,sirloin,boneless....	27.37	10.40	2.22	3.64	6.64	10.11	8.94	1.83
Roast, pork, boneless.....	10.29	4.87	3.95	4.19	3.47	3.43	5.62	2.36
Broilers, whole.....	3.83	2.22	1.27	1.32	2.90	2.03	2.26	1.22
Eggs, large, dozen.....	3.44	1.17	.67	.88	1.69	1.47	.98	.54
Butter.....	10.59	4.10	3.03	2.86	3.15	2.79	7.42	3.55
Cheese,Cheddar,Emmenthaler	10.99	6.97	3.71	5.86	4.49	3.71	8.61	2.96
Milk, whole, liter.....	1.01	.53	.20	.25	.60	.56	.55	.22
Oil, cooking, liter.....	3.05	.84	.55	1.26	2.34	1.13	2.15	.95
Potatoes.....	.71	.34	.58	.79	1.05	.49	.32	.43
Apples.....	1.78	1.06	1.12	2.17	1.94	1.22	1.11	.60
Oranges.....	1.77	1.19	.15	.85	.71	1.19	.68	.14
Flour.....	1.21	.64	.23	.31	.87	.46	.57	.27
Rice.....	1.95	1.83	.56	1.04	.92	1.16	1.14	.38
Sugar.....	.81	.95	.31	.75	.61	.66	.79	.19
Coffee.....	11.57	12.36	6.59	9.60	12.31	9.80	8.35	2.96
TOTAL.....	90.37	49.47	25.14	35.77	43.69	40.21	49.49	18.60
(Total May 1986).....	83.79	47.80	25.15	37.95	40.01	47.20	47.49	26.40

Bonn: Steak, sirloin,--bone-in

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Item	Ottawa	Paris	Pre- toria	Rome	Seoul	Stock- holm	Tokyo	Wash D.C.
Steak,sirloin,boneless....	7.36	11.23	5.74	10.71	7.00	19.17	39.57	10.10
Roast, pork, boneless.....	4.96	6.01	3.88	5.71	4.24	20.42	11.74	6.17
Broilers, whole.....	3.33	2.94	1.44	4.03	1.75	6.30	4.97	2.27
Eggs, large, dozen.....	.84	.85	.75	1.29	1.12	2.30	1.74	.77
Butter.....	4.46	4.54	1.99	5.11	4.64	5.09	8.03	5.46
Cheese,Cheddar,Emmenthaler	7.95	6.06	4.13	8.20	9.29	9.21	6.70	7.05
Milk, whole, liter.....	.84	.69	.39	.80	.84	.65	1.18	.46
Oil, cooking, liter.....	1.51	1.70	1.79	.96	1.43	5.88	1.93	2.03
Potatoes.....	.40	.58	.42	.43	.37	.53	1.49	.95
Apples.....	2.16	1.02	.77	1.29	1.17	2.00	3.34	2.16
Oranges.....	1.58	1.17	.76	1.43	.97/1	1.23	1.98	1.35
Flour.....	.82	.89	.52	.51	.32	.87	1.24	.44
Rice.....	1.57	1.66	.75	1.36	1.14	2.26	2.42	1.04
Sugar.....	.33	.95	.60	.94	.70	.98	1.48	.73
Coffee.....	9.77	6.95	12.93	9.61	15.67	10.72	19.96	7.67
TOTAL.....	47.88	47.24	36.86	52.38	50.65	87.61	107.77	48.56
(Total May 1986).....	45.03	47.41	32.36	48.94	50.68	85.46	110.31	45.45

Note: One kilogram=2.2046 pounds; One liter=1.0567 quarts.
1/ Tangerines

EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of Dec. 2, 1986, was as follows in metric tons:

ANNOUNCED INITIATIVES	DATE ANNOUNCED	QUANTITY/RESULTS	
52. Tunisia barley	Dec. 1, '86	150,000	
51. Gulf countries (Bahrain Kuwait, Oman, Qatar, United Arab Emirates) dairy cattle	Oct. 30, '86	1,500 head	
50. West Africa (Cameroon Cote d'Ivoire, Ghana, Togo) wheat	Oct. 30, '86	345,000	
49. Dominican Republic poultry	Oct. 29, '86	1,500	Sold 643
48. Philippines barley malt	Oct. 20, '86	60,000	Sold 25,000
47. Cameroon wheat flour	Oct. 14, '86	20,000	
46. Romania barley	Sept. 24, '86	200,000	Sold 125,000
45. Venezuela barley malt	Sept. 4, '86	100,000	
44. Cyprus barley	Aug. 26, '86	150,000	Sold 75,000
43. Canary Islands wheat	Aug. 8, '86	100,000	
42. Egypt semolina	Aug. 6, '86	30,000	Sold 15,000
41. Soviet Union wheat	Aug. 1, '86	4,000,000	EXPIRED

EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

40.	Canary Is. dairy cattle	July 28, '86	3,000 head	
39.	Hong Kong table eggs	July 28, '86	44 million	
38.	Senegal wheat	July 17, '86	100,000	COMPLETE
37.	India vegetable oil	July 8, '86	25,000	
36.	Jordan barley	June 17, '86	60,000	
35.	Israel barley	June 17, '86	200,000	Sold 36,200
34.	Tunisia dairy cattle	May 29, '86	4,000 head	
33.	Algeria dairy cattle	May 29, '86	5,000 head	
32.	Sri Lanka wheat	May 16, '86	125,000	Sold 75,000
31.	Saudi Arabia barley	May 7, '86	500,000	COMPLETE
		Aug. 6, '86	250,000	COMPLETE
		Sept. 16, '86	300,000	COMPLETE
		Oct. 8, '86	200,000	COMPLETE (201,000)
30.	Algeria barley	Apr. 17, '86	500,000	
29.	Morocco dairy cattle	Apr. 16, '86	4,000 head	Sold 3,020
28.	Turkey dairy cattle	Apr. 16, '86	5,000 head	
27.	Egypt dairy cattle	Apr. 16, '86	6,000 head	COMPLETE
		Sept. 12, '86	10,000 head	Sold 1,055
26.	Yemen poultry feed	Apr. 14, '86	150,000	
25.	Yugoslavia wheat	Apr. 10, '86	200,000	COMPLETE
		June 24, '86	200,000	Sold 190,950
		Oct. 7, '86	500,000	
24.	Indonesia dairy cattle	Apr. 9, '86	7,500 head	COMPLETE
23.	Syria wheat	Apr. 8, '86	700,000	CANCELLED
22.	Benin wheat	Apr. 7, '86	45,000	Sold 30,000
21.	Algeria table eggs	Apr. 4, '86	500 million	
20.	Iraq dairy cattle	Apr. 4, '86	6,500 head	Sold 200
19.	Jordan wheat	Mar. 19, '86	75,000	COMPLETE
		June 20, '86	75,000	COMPLETE
18.	Tunisia wheat	Mar. 18, '86	300,000	COMPLETE
		Aug. 22, '86	800,000	Sold 250,000
17.	Algeria wheat flour	Feb. 25, '86	100,000	
16.	Algeria semolina	Feb. 11, '86	250,000	
15.	Philippines wheat	Jan. 7, '86	150,000	COMPLETE (152,400)
14.	Zaire wheat	Dec. 27, '85	40,000	COMPLETE
		May 15, '86	40,000	COMPLETE
		Oct. 17, '86	40,000	
13.	Nigeria barley malt	Dec. 10, '85	100,000	Sold 4,400
12.	Iraq wheat flour	Dec. 9, '85	150,000	Sold 100,000
11.	Egypt poultry	Nov. 26, '85	8,000	COMPLETE
		Mar. 21, '86	15,000	COMPLETE
		June 18, '86	5,000	COMPLETE
		July 8, '86	15,000	COMPLETE

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

10. Zaire wheat flour	Nov. 18, '85	64,000	COMPLETE
	May 15, '86	30,000	Sold 15,000
9. Philippines wheat flour	Nov. 15, '85	100,000	Sold 50,000
8. Jordan rice	Nov. 8, '85	40,000	Sold 38,700
7. Turkey wheat	Oct. 16, '85	500,000	COMPLETE (506,600)
	May 8, '86	500,000	Sold 100,000
6. Morocco wheat	Sept. 30, '85	1,500,000	Sold 890,000
5. Yemen wheat	Sept. 6, '85	100,000	COMPLETE
4. Yemen wheat flour	Aug. 20, '85	50,000	COMPLETE
	Apr. 14, '86	100,000	Sold 63,000 LT
3. Egypt wheat	July 26, '85	500,000	COMPLETE
	Oct. 30, '85	500,000	COMPLETE (512,500)
	June 24, '86	500,000	COMPLETE
	July 29, '86	52,000	Sold 29,000
	Oct. 8, '86	1,000,000	
2. Egypt wheat flour	July 2, '85	600,000	COMPLETE
	Aug. 6, '86	600,000	
1. Algeria wheat	June 4, '85	1,000,000	COMPLETE
	Apr. 10, '86	1,000,000	Sold 354,000
	Nov. 10, '86	300,000	

EXPORT ENHANCEMENT PROGRAM SUMMARY

Status as of Dec. 2, 1986

Announced to Date 16,502,438 (grain equivalent)
 544 million table eggs
 44,500 tons frozen poultry
 52,500 head dairy cattle
 25,000 tons vegetable oil

Sold to Date 6,020,459 wheat
 1,292,622 flour (grain equivalent)
 1,487,200 barley
 20,550 semolina (grain equivalent)
 39,199 barley malt (grain equivalent)
 38,700 rice
 43,643 frozen poultry
 17,750 head dairy cattle

Total Sales Value: \$920.7 million
 Estimated Bonus Book Value: \$534.2 million.

TARGETED EXPORT PROMOTION PROGRAM

No announcements were made under USDA's Targeted Export Promotion Program this week.

Selected International Prices

Item	: December 2, 1986	: Change from	: A year
	:	: a week ago	: ago
ROTTERDAM PRICES 1/	\$ per MT	\$ per bu.	\$ per MT
Wheat:			\$ per MT
Canadian No. 1 CWRS-13.5%.	N.Q.	--	N.Q.
U.S. No. 2 DNS/NS: 14%....	137.50	3.74	-0-
U.S. No. 2 S.R.W.	N.Q.	--	152.00
No. 3 H.A.D.....	150.00	4.08	--
Canadian No. 1 A: Durum.10/	158.00	4.30	+3.00
Feed grains:			N.Q.
U.S. No. 3 Yellow Corn....	86.50	2.20	+2.00
Soybeans and meal:			122.50
U.S. No. 2 Yellow.....	203.95	5.55	+2.95
Brazil 47/48% Soya Pellets	179.00 10/	--	-0-
U.S. 44% Soybean Meal.....	181.00	--	-1.00
U.S. FARM PRICES 3/			177.00
Wheat.....	87.44	2.38	-0.73
Barley.....	52.82	1.15	-9.19
Corn.....	59.45	1.51	-2.76
Sorghum.....	54.45	2.47 2/	+4.85
Broilers.....	1256.84	--	-9.92
EC IMPORT LEVIES			1139.12
Wheat 5/.....	194.50	5.29	+4.95
Barley.....	187.55	4.08	+6.00
Corn.....	175.75	4.46	+5.50
Sorghum.....	178.55	4.54	+6.20
Broilers 4/ 6/ 8/.....	457.00	--	+6.00
EC INTERVENTION PRICES 7/ 9/			245.00
Common wheat(feed quality)	191.95	5.22	+2.60
Bread wheat (min. quality)	201.35	5.48	+2.70
Maize.....	201.35	5.11	+2.70
Barley and all other feed			167.55
grains, excluding maize.	191.95	--	+2.60
Broilers 4/ 6/.....	1546.00	--	+30.00
EC EXPORT RESTITUTIONS (subsidies)			1266.00
Wheat	N.A.	--	--
Barley.....	N.A.	--	--
Broilers 4/ 6/ 8/.....	368.00	--	+5.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. 10/ April delivery. N.A.=None authorized. N.Q.=Not quoted. Note: Basis December delivery.

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